

Software House International (SHI)

Microsoft Select Software Large Account Reseller (LAR)

Contract Requirements

Requirement 1

The contractor shall provide all sales, support, management, and reporting services required to process and account for requests and sales of Microsoft Select software products via the Agreement.

SHI Response

Dedicated Account Management

SHI has established the Dedicated Account Team approach as core in executing an effective customer service strategy. Based on customer requirements the following positions could be included in the direct customer management:

Account Executive—Katie O’Kane—Direct sales related position with a mission of developing relationships state government and agencies. Responsibilities include establishing a customized service and support plan, resolving licensing issues, and constructing a pricing strategy and other topics critical to account development.

Manager, Inside Sales Support—Dianne Borysewicz—Coordinates, maintains and manages the activities of the Inside Sales Representatives.

Inside Sales Representatives—Jason Winters and Diane Christiansen—Maintains direct relationships with the customers and has the responsibility of ensuring customer satisfaction. Functional areas such as pricing, availability, order entry, tracking, returns, product information and expedites are an integral part of his daily activities. He executes the plan established by the Account Executive for a customer.

Volume Licensing Executive—Elissa Ott—assists the customer with Licensing-related questions, provides evaluation of your purchase history and forecasts to advise on the VLP options that best fit your needs, and provides training and information to your employees on how to best utilize your programs.

Customer requirements will dictate which type and the number of personnel that will be assigned to your Account. It is important that SHI minimizes the number of different contacts with whom our customers will interact in order to manage its business efficiently. The Inside Sales Representative has the autonomy to execute service issues such as expedites, returns and re-ships invoices and special price requests. Our goal is to provide you with one contact for all your needs.

Empowered Account Team

SHI has established the empowered dedicated account team as core in customer satisfaction. We have ensured that all sales personnel have the training and resources they need to immediately provide the customer with accurate, up-to-date information.

Your Dedicated Account Team has all of the information that they need about the licensing programs that we support. Each Inside Sales Representative must attend periodic training sessions on all Volume License Programs, which are conducted by either the manufacturer representative, or by a member of the dedicated Licensing Department at SHI. Additionally, the Licensing Department maintains a Lotus Notes Database of all manufacturers who have licensing programs. The database contains documents that answer frequently asked questions about how the programs work, including program description, program requirements, pricing, part numbers, enrollment forms, etc.

SHI has limited the layers of management in our organization in order to provide more efficient customer service. Your sales representatives have the authority to answer any questions and to resolve most of the issues that the State will have without consulting another department and without

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Contract Requirements

the need for management approval. This includes quotes, returns, return exceptions, and order tracking.

Volume License Support

SHI has established itself as the most effective license provider in the industry based on our reporting excellence. Our abilities will relieve the burden of tracking associated with these types of agreements. These reports can consolidate all Volume License Programs, or can be reported individually for each independent program.

Tracking:

SHI has customized our order entry system to support the tracking of multiple Volume License Programs for all customers. This is facilitated at the time of order entry. When a license only product is entered, the system calls for a manufacturer's volume license program to be selected for that item, i.e. Lotus Passport, Microsoft Select, IBM Advantage, etc. After selecting the appropriate volume license program, a drop down box appears forcing the person entering the order to choose the agreement number that is applicable to the customer's order. Many times, a single customer will have multiple enrollment numbers against one Volume Purchase Agreement. This identification process allows for licenses to be properly allocated to the correct agreement number. Because the program and agreement identification takes place at the time of order entry, SHI is able to report cleanly and consistently to both customers and manufacturers license acquisitions against the Volume Purchase Agreements. Additionally, **Maintenance Expiration Dates** are tracked, to give prompt, pro-active notification to the end client for **Maintenance Renewal** purposes. SHI supports, and can track Maintenance Programs that have co-terminus expiration and are pro-rated, or non co-terminus programs. Maintenance Tracking and Renewal Notification is implemented for all Programs or Maintenance purchases made through SHI, whether supported by a Volume License Program, or other.

Reporting:

SHI provides for Volume Purchase Agreement specific reports. These reports are known as *Software HELP, the SHI Enterprise License Program Reports*. These reports can be run individually for each program, or combine all of your company's volume license agreements.

- ⇒ *Global Summary* - Perfect for the Contract Administrator, the Global Summary report summarizes all of the purchases under a particular agreement(s).
- ⇒ *Organizational Summary* - This report provides part number purchase summary based upon business unit, location or other customer defined entity.
- ⇒ *Program Statement* - This report provides detailed information on all transactions for the programs selected.
- ⇒ *VPA Milestone*—provides a summary of your purchases for contract milestone comparisons—by point value, quantity, or dollar value, depending upon your contract terms.

The SHI HELP Center—The SHI Volume Licensing Representatives are assigned to specific manufacturer agreements. They work closely with those manufacturers to understand their volume licensing agreements, to ensure that SHI has the most up-to-date information available, and to distribute this information to SHI's sales representatives. The Licensing Representatives are responsible for reporting the customers' purchases to the manufacturer within the timeframe and format required. These representatives are available to assist your Account Representatives and the State with questions regarding your licensing agreements.

Software House International (SHI)

Microsoft Select Software Large Account Reseller (LAR)

Contract Requirements

Requirement 2

The contractor shall develop, within 30 days after contract award, and maintain during the life of this contract, an Internet Web page to provide public access to product and contract information to include:

- A. Product Number
- B. Product Name
- C. Applicable ERP
- D. Percentage Discount
- E. Discount Price
- F. Enrollment Forms and Procedures
- G. Contract Information
- H. An "Announcement and Information Page"
- I. A product number or a keyword search engine (requiring minimum mouse clicks)
- J. A feature to allow downloads and printing of the entire price list, as well as pricing information for individual items or groups of items, in addition to all forms and procedures.
- K. A clear display of the last date the web site was updated.

SHI Response

SHI's eCommerce Solution meets all of the State's requirements as outlined above. We provide a customized product catalog for each of our individual customers. The catalog that we create for the State of MD will only contain those products that are included in the contract between the state and SHI. The pricing in the catalog also will reflect the contracted pricing. SHI provide customizable areas of the site, where we can provide the State's specific contract information, enrollment forms and instruction regarding how to complete the forms, as well as complete contact information for your Dedicated Account Team at SHI. We can include any other information that the State deems important and that you want communicated to your end user population.

SHI has created a custom home page and product catalog for the State of MD to review. You can access this site at www.shi.com. Click on "Your Home" and enter user name: statemd and password: statemd.

Requirement 3

The Contractor is responsible for providing guidance and information about the respective rights and responsibilities applicable to the Agreement to Authorized Contractors, Authorized Users or Potential Users on an as-needed basis. Responses to inquiries concerning such topics as the term of the Agreement, services or products provided, how to complete the enrollment process, etc., are to be provided directly and efficiently to the requestor.

SHI Response

Your Account Executive at SHI will meet with the authorized and potential users of the Agreement to explain the benefits of the agreement, how to enroll under the agreement, and answer any of their questions and assist with the processes. The Account Executive will engage the assistance of SHI's Licensing Executive, as needed. SHI will provide complete support to the State in creating and managing the enrollments.

Software House International (SHI)
Microsoft Select Software Large Account Reseller (LAR)
Contract Requirements

Requirement 4

The Contractor is responsible for processing all enrollment forms within one (1) business day after receipt and providing assistance in the enrollment process, if requested.

SHI Response

SHI understands this requirement and agrees. The members of your Dedicated Account Team and of the SHI licensing department are available to assist the customer with completing the appropriate enrollment forms. In addition, the members of our Licensing Department review each enrollment before submission and will assist the customer with correcting errors. This process ensures that the enrollment forms can be processed more quickly and efficiently for the customer.

Requirement 5

The contractor shall provide a response to requests for information or price quotes within one (1) business day after receipt of the request. All price quotes will be in writing and include the applicable ERP, percentage discount and discount price for each product requested.

SHI Response

Because SHI supports our customers with a Dedicated Account Team, we cannot only guarantee responses to inquiries within 1 business hour, but we can also guarantee that the customer will receive the correct information. Your Inside Sales Representatives will be fully trained on your Microsoft Agreement and the terms and conditions of the contract between SHI and the State. This means the State employees will receive the correct information the first time.

Requirement 6

The Contractor shall provide product order fulfillment within five (5) business days after receipt of the order.

SHI Response

SHI understands and complies with this requirement.

Requirement 7

The Contractor will provide the most current Microsoft ERP issued by Microsoft to the Contract Manager in an MS Excel format, or other format acceptable to the State via email on a monthly basis.

SHI Response

Your Account Executive will provide the updated Microsoft Select Price List to the Contract Manager via Email on a monthly basis. In addition, on the day when the new pricing becomes effective, your on-line product catalog will also be updated with the appropriate pricing.

Software House International (SHI) Microsoft Select Software Large Account Reseller (LAR) Contract Requirements

Requirement 8

The Contractor shall provide an electronic “Monthly Activity Report” to the Contract Manager in an MS Excel format, or other format acceptable to the State, by the 15th of the following month.

SHI Response

SHI's reports will include all of the information required by the State of MD.

SHI prides itself on its reporting excellence and flexibility. We have developed standard reports that meet the needs of most of our customers. If the State has additional reporting requirements, SHI will develop custom reports, as we have for some of our largest customers. For example, many customers require reporting based on more detailed information than would normally be captured in order entry, such as organizational code or business unit. Therefore, SHI has customized our order entry system to capture additional information and the reports that provide this information to the customer.

Sales History Report - This standard report provides an overview of your purchases from SHI. As mentioned above, our system allows for the tracking of Customer Specific Fields, therefore we are able to generate this report in many ways. SHI will provide these reports in any time frame that you require, and in one of three formats: *detail* of all transactions, *summary* by part number, or *summary* by manufacturer name.

We can group reports into two different categories:

- ⇒ **Customer Driven**-Customer driven reports are those that the customer requests when the interest is specifically in the customer information (i.e. Business Unit, specific organization, entire company, division, etc). The customer information will take precedence over the product information. An example of this type of report is how much did a certain department purchase within the month of October.
- ⇒ **Manufacturer Driven**-Manufacturer driven reports are those that the customer requests when the interest is in the expenditures that occurred for a specific period of time. The manufacturer information or product information will take precedence over the customer information. An example of this type of report would be how many Microsoft products did a specific department order in the month of October.

Software HELP Reports - *SHI Enterprise License Program Reports* - SHI has established itself as the most effective License provider based on its reporting excellence. Our capabilities will relieve the burdensome requirements of these agreements. These reports can consolidate all of your license agreements, or focus on a single program.

- ⇒ **Global Summary** - Perfect for the Contract Administrator, the Global Summary report summarizes all of the purchases under a particular agreement(s).
- ⇒ **Organizational Summary** - This report provides part number purchase summary based upon business unit, location or other customer defined entity.
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